

# Coming Back to Theatre

## Prioritising the Audience Experience

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Audience views on returning to theatres in 2021

April 2021

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## Context

In March 2021 (most) theatres had been closed for a year as a result of the Covid pandemic, subsequent restrictions and lockdowns. A few theatres had managed to re-open briefly in some areas, but often with very limited facilities, shorter performances, and reduced capacities.

By March 2021, however, there was a new government roadmap to reopening in place, which suggests that theatres may be able to open, with some social distancing measures in place, from May 17<sup>th</sup>.

This has led to a flurry of excitement and activity to get theatres and audiences ready for this anticipated moment.

Indigo's previous research had suggested that only around 25% of theatregoers were willing to return quickly to venues, around half would return with social distancing and other measures in place (50%) and the remainder wanted to wait or were not planning to return at all. This suggested that a considerable amount of reassurance and confidence-building would be needed to persuade the majority of (previously very frequent) attenders to re-attend.

Therefore, pointOne and Indigo were keen to find out what effect offering food and beverage offerings in a Covid-safe way might have on people's decisions whether or not to re-attend theatres immediately – and what might venues put in place to help guarantee audiences the great theatre experience they had previously enjoyed.

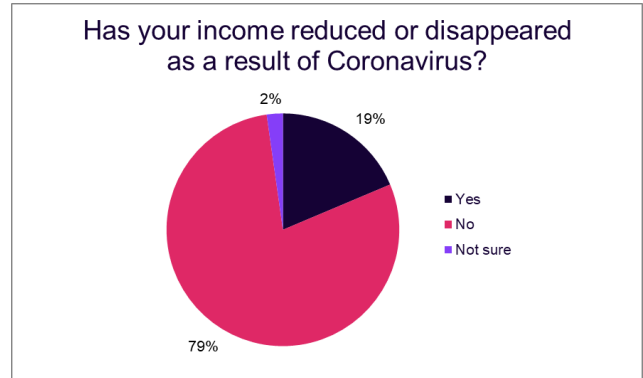
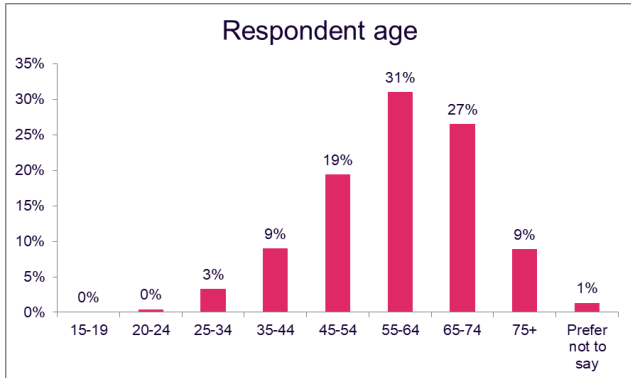
## Section 1: Methodology and Sample

pointOne theatre clients were invited to send an email to a sample of their attenders inviting them to complete the survey via a link provided, and offered a chance to enter a prize draw for a magnum of champagne, or hamper of chocolate. Eight organisations took part, and the survey received 4,000 responses.

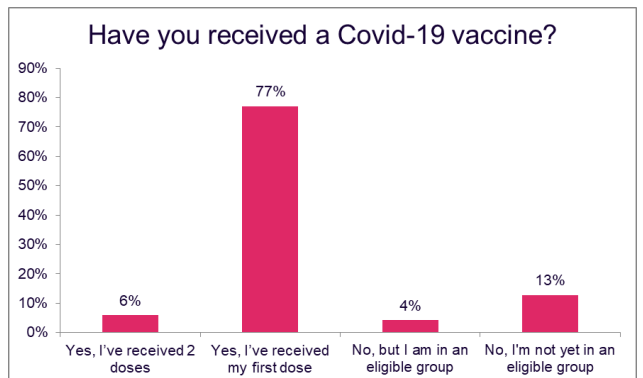
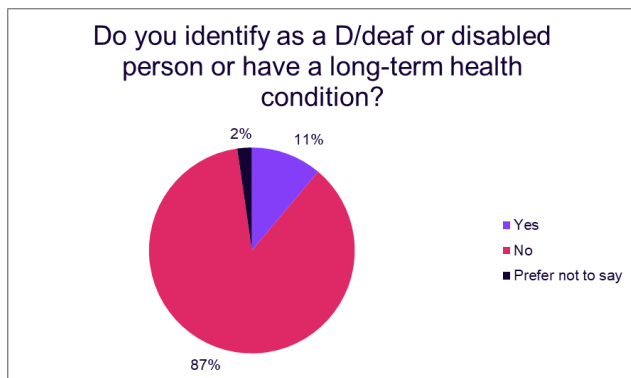
## Sample breakdown

Responses: 3,955

Respondents were representative of a typical frequent theatre audience with a slightly older than average age profile; 80% are financially unaffected by Covid.



11% of respondents were D/deaf or disabled and 82% has received at least the first dose of a Covid-19 vaccination.



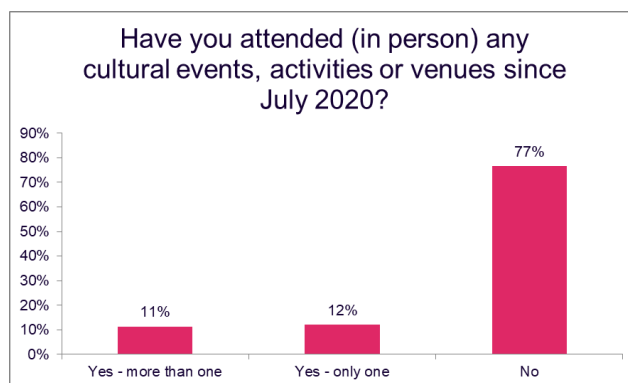
## Section 2: Overall findings

### 2.1 Attending during Covid

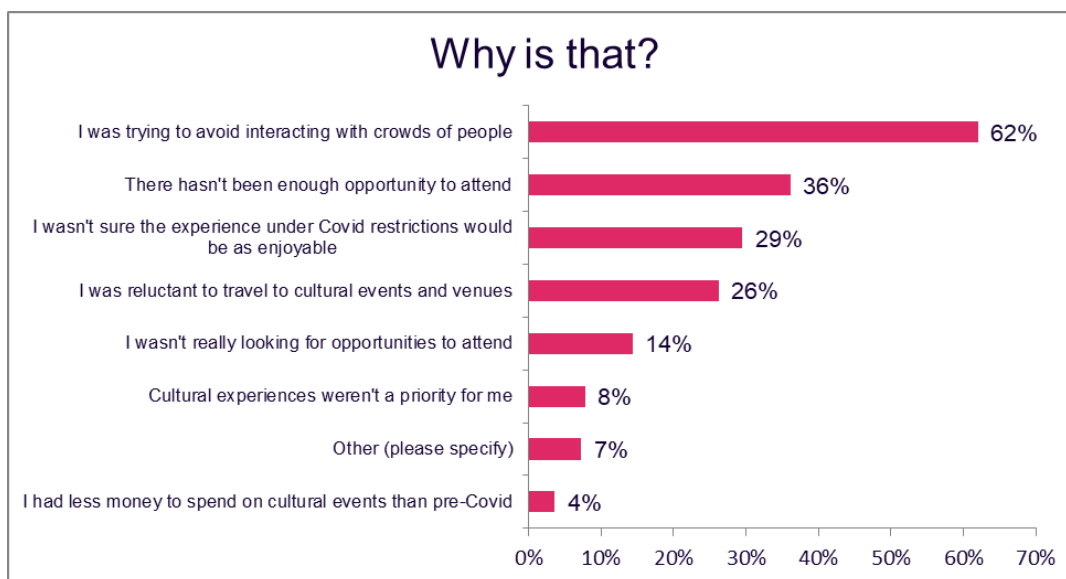
Over ¾ of respondents had not re-attended a theatre or cultural events since Covid hit in 2020, so for most people, their visit in 2021 will be their first for a considerable time.

**Have you attended (in person) any cultural events, activities or venues since July 2020?** Responses: 3,955

**77%**  
of respondents have not attended any cultural events or activities since July 2020



**Q: Why is that? (for those who haven't attended)**  
Responses: 2,930



**62%**  
wanted to  
AVOID CROWDS

**36%**  
hadn't had the  
OPPORTUNITY to  
attend anything

**29%**  
were worried it would not  
be ENJOYABLE with  
restrictions in place

However, those who had managed to re-attend had felt safe and comfortable, and confident in the measures put in place by the venue they attended.

Q: How confident were you in the Covid safety measures put in place at your visit? (for those who did attend)

Responses: 773

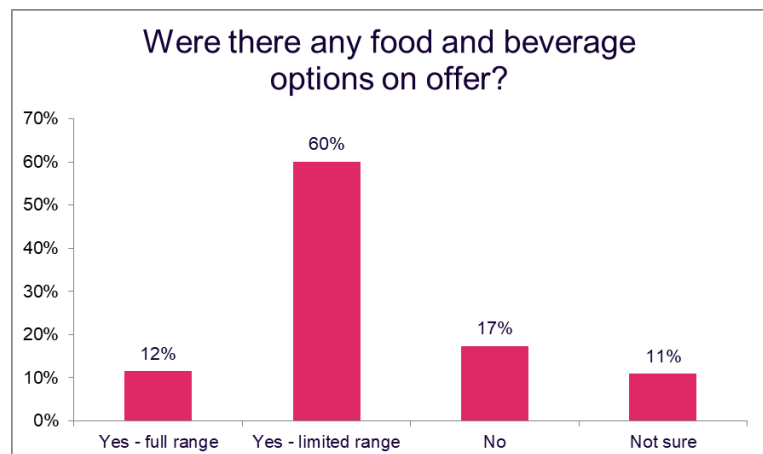


In most cases there was a limited F&B offer – with only a small percentage offering their full range.

Q: Were there any food and beverage options on offer?

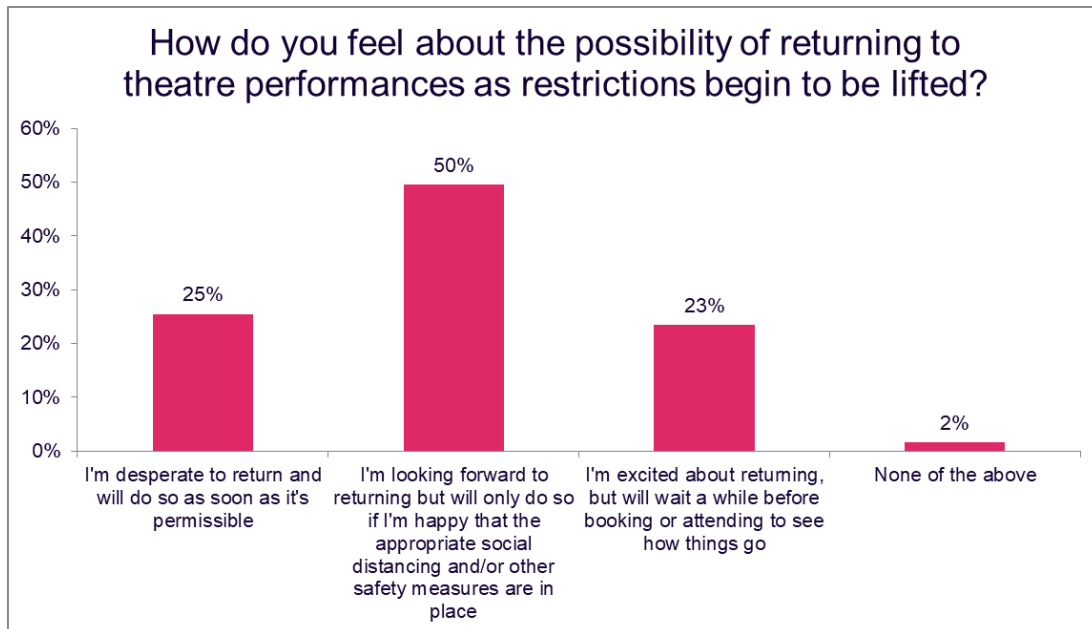
Responses: 852

Only  
**12%**  
offered a FULL RANGE  
OF F&B options



## 2.2 When will audiences return?

There is a significant proportion of respondents showing some hesitancy about returning to venues – ½ only willing to do so with social distancing measures in place and ¼ wanting to wait a while.

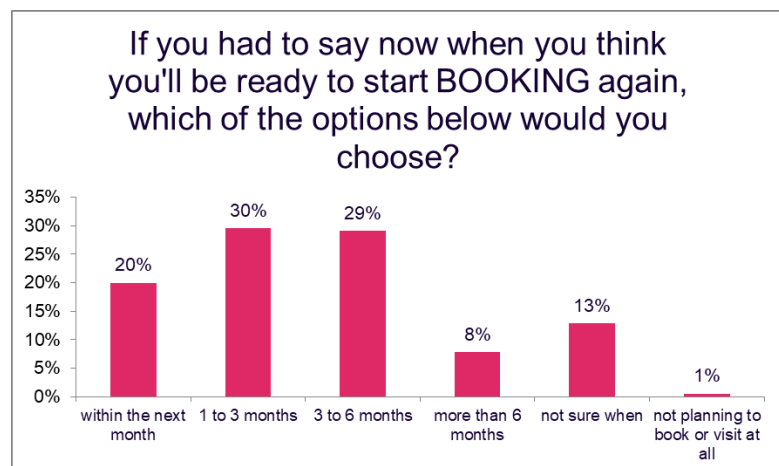


**Q:** If you had to say now when you think you'll be ready to start **BOOKING** for events again, which of the options below would you choose?

Responses: 3,718

Similarly only 20% are looking to book within the next month with over half looking at 3 months or more before making their first booking.

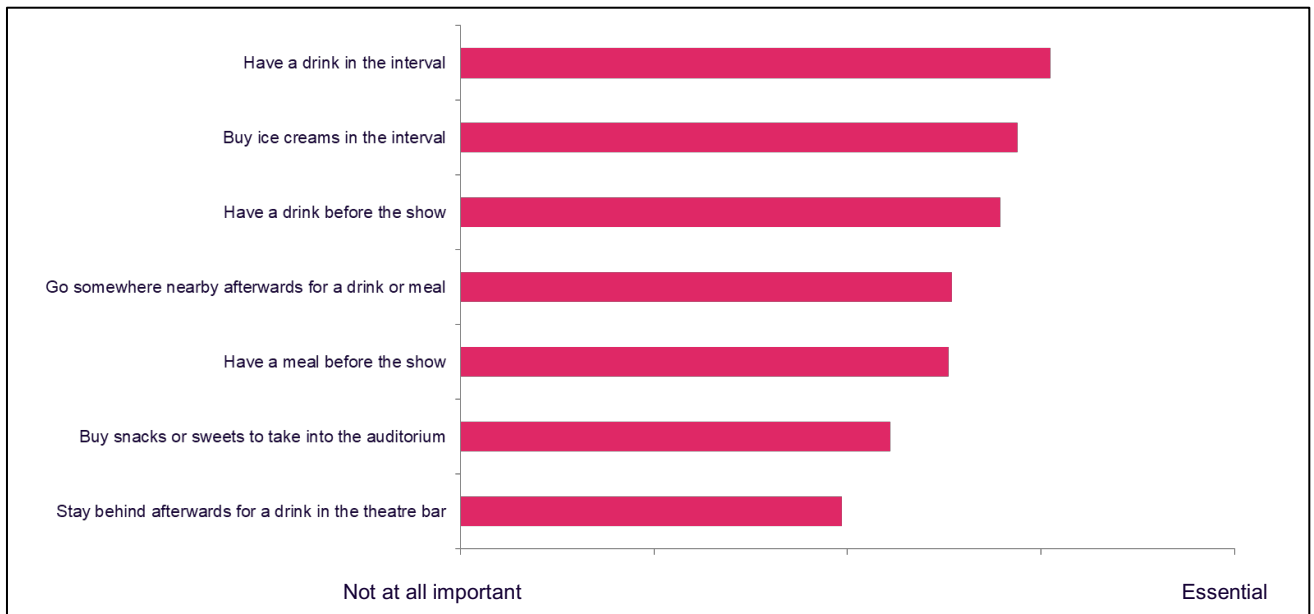
**50%**  
would not consider booking for events for over 3 months



## 2.3 What will audiences want and expect?

**Q:** Thinking about your IDEAL trip to the theatre, how important would you say each of the following is in making it a great experience?

Responses: 3,705



It's clear that the in-venue offer is of the highest importance to theatre attenders – a drink before the show or during the interval, and ice-creams in the interval.

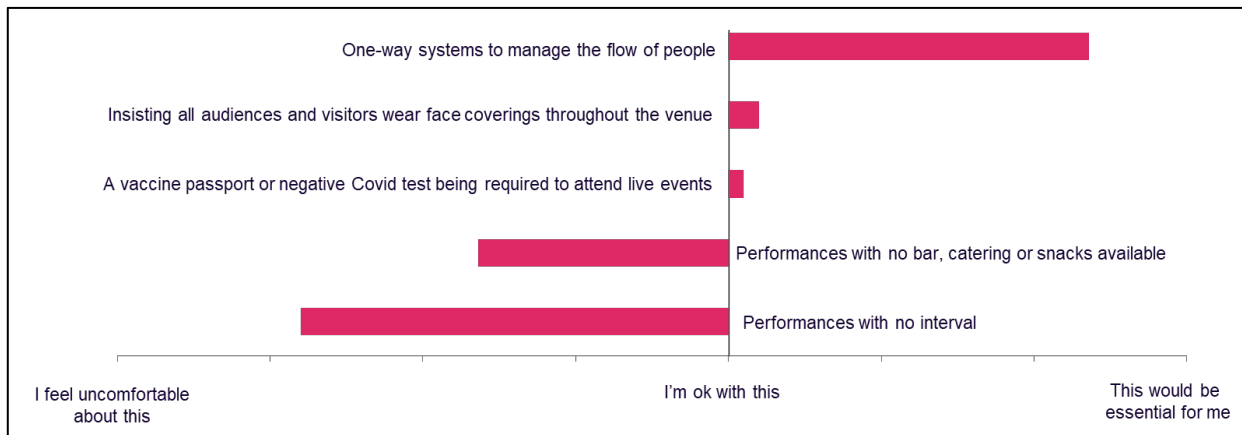
Option	Importance score
<b>Having a drink in the interval</b>	<b>76%</b>
<b>Buying an ice cream in the interval</b>	<b>72%</b>
<b>Having a drink before the show</b>	<b>70%</b>
Going somewhere nearby afterwards for a drink or meal	64%
Having a meal before the show	63%
Buying snacks or sweets to take into the auditorium*	55%
Staying behind afterwards for a drink the theatre bar	49%

\*This was a much higher percentage for younger audiences, for whom it is more important

This suggests that venues who are able to offer a Covid-safe (even if limited) drinks and ice-creams offer could benefit from significant secondary spend to compensate for lower capacities and ticket income.



**Q: How do you feel about the following being implemented or considered by some theatres?**  
*Responses: 3,705*



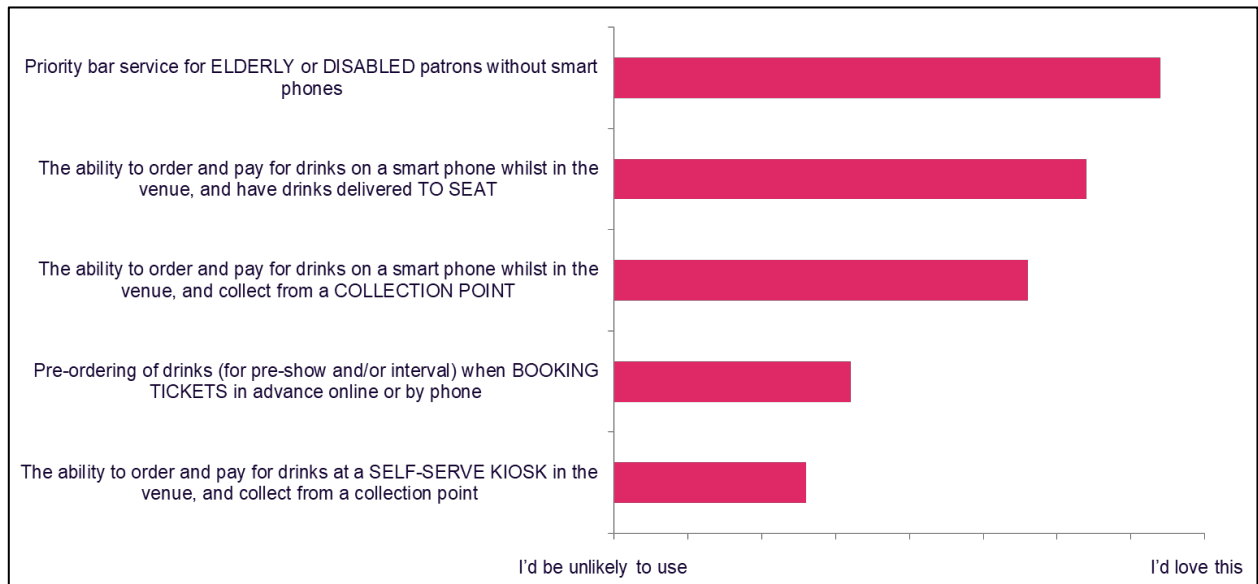
The responses to this question show that the least attractive options for audiences are performances which do not have an interval, or those with no catering on offer.

As we saw above, having a drink before the show or during the interval is an important aspect of the experience, so for many people if it wasn't available, re-attending would be a considerably less attractive option for them. Coupled with the fact that only 1/2 of respondents say they'll re-book within 3 months, this is an important finding.

## 2.4 How might technology help?

We wanted to ask audiences how they would feel about changing the way in which they ordered food and drinks at the venue, and which would be most attractive to them.

We also included an idea to make a priority bar/queue service for people who would not be in a position to use such technology. The results were heartening.



Option	Attractiveness score
<b>Priority bar service for elderly or disabled patrons without smart phones</b>	<b>78%</b>
<b>The ability to order and pay for drinks on a smart phone whilst in the venue, and have drinks delivered TO SEAT</b>	<b>77%</b>
<b>The ability to order and pay for drinks on a smart phone whilst in the venue, and collect from a COLLECTION POINT</b>	<b>76%</b>
Pre-ordering of drinks (for pre-show and/or interval) when BOOKING TICKETS in advance online or by phone	73%
The ability to order and pay for drinks at a SELF-SERVE KIOSK in the venue, and collect from a collection point.	72%
Buying snacks or sweets to take into the auditorium	55%
Staying behind afterwards for a drink the theatre bar	49%

All of the options were attractive to audiences, but in particular the in-venue ordering by smart phone was very popular – and the people liking the idea of the priority service for elderly customers were predominantly younger respondents!

As the theatre sector reopens, it's clear that technology will play a key role in navigating the continued need for social distancing to provide a safe and easy way to order food and drinks both before and during interval time.

This research demonstrates that theatregoers, regardless of demographic, are willing to embrace digital self-ordering and welcome the additional convenience of having drinks delivered to their seat or picking up from a designated collection point.

Ultimately, the message coming out of this audience sentiment research is that theatregoers trust that theatre operators will consider all the necessary measures, including any technical provision such as Mobile Order & Pay, to ensure the ongoing safety and utmost convenience for their patrons.

### Steven Rolfe, CEO, pointOne

*Founded in 2001 by **Steven Rolfe and Nick Williams**, **pointOne** had one aim, to develop and deliver innovative EPoS solutions and tools for the hospitality sector, all backed up by outstanding support and project delivery. Over the last 20 years, the company has achieved this core objective and much more. We are now installed in over 2500 outlets.*

*On the back of successes within the Arts sector, pointOne founded an Arts and Culture division and now the solution includes many theatre-specific features to manage interval ordering, ticketing integration and kiosks, as well as focused learning and support for our customers. We have over 50+ theatre venue customers and are growing fast, making us the go-to EPoS partner for the Arts Sector.*

Audiences will be looking for reasons to reattend, and reassurances that if they do, all their needs will be met, safely and enjoyably. The technological solutions offered by pointOne may allow many theatres to move from customer 'satisfaction' to customer delight, by introducing services they say they will 'love' – such as an at-seat service for drinks.

But this does not mean that a technology-led approach can't be inclusive. When we tested the idea of a priority bar service for people without smartphones (assuming that those who did have phones would use them), this was applauded by young as well as old people – so there are ways of helping audiences to help each other to all enjoy the experience together – which surely is what Theatre is all about.

### Katy Raines, Partner, Indigo-Ltd

***Indigo Ltd** is a specialist consultancy working in the Arts, Heritage and Cultural sectors. We specialise in projects involving marketing, audience development, branding, research and consultation, strategic planning, fundraising and organisational development.*

*Founded in 2007, Indigo's partners and associates spent their earlier careers as marketing and fundraising practitioners from cultural organisations, and are regularly embedded in cultural charities to develop their professional practise.*

***Katy Raines**, the author of this survey, is founding partner of Indigo, and regarded as one of the UK's leading consultants on data-driven marketing for Cultural Organisations. She has developed and led research and implementation programmes for large and middle scale organizations throughout the UK and Europe. She has a particular passion for CRM and segmentation, and in using data to effect change and drive an audience-led approach for any cultural organisation.*

*Her current clients include The Lowry, MAC Belfast, Warwick Arts Centre, National Museums Liverpool, Shakespeare's Birthplace Trust and Coventry City of Culture 2021. Prior to becoming a consultant in 2006 she held a number of senior marketing roles in large scale venues, holds a Music degree from Cambridge University and a 1<sup>st</sup>-class MBA from Durham University*